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ABSTRACT

The general purpose of the occupational analysis is to provide workable, basic information dealing with the many and varied duties performed in the insurance sales occupation. The document opens with a brief introduction followed by a job description. The bulk of the document is presented in table form. Eleven duties are broken down into a number of tasks and for each task a two-page table is presented, showing on the first page: tools, equipment, materials, objects acted upon; performance knowledge (related also to decisions, cues and errors); safety--hazard; and on the second page: science; math--number systems; and communications (performance modes, examples, and skills and concepts). The duties include: prospecting; servicing, selling, writing, and delivering policies; collecting premiums; accounting for premiums collected; preparing reports; maintaining good public relations; rating; and maintaining an office. Appended is a list of standard sales and office equipment. (BP)

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Occupational Analysis

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INSURANCE SALESPERSON

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Instructional Materials Laboratory
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5188

AN ANALYSIS OF THE INSURANCE SALES OCCUPATION

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FOREWORD

The occupational analysis project was conducted by The Instructional Materials Laboratory, Trade and Industrial Education, The Ohio State University in conjunction with the State Department of Education, Division of Vocational Education pursuant to a grant from the U.S. Office of Education.

The Occupational Analysis project was proposed and conducted to train vocational educators in the techniques of making a comprehensive occupational analysis. Instructors were selected from Agriculture, Business, Distributive, Home Economics and Trade and Industrial Education to gain experience in developing analysis documents for sixty-one different occupations. Representatives from Business, Industry, Medicine, and Education were involved with the vocational instructors in conducting the analysis process.

The project was conducted in three phases. Phase one involved the planning and development of the project strategies. The analysis process was based on sound principles of learning and behavior. Phase two was the identification, selection and orientation of all participants. The training and workshop sessions constituted the third phase. Two-week workshops were held during which teams of vocational instructors conducted an analysis of the occupations in which they had employment experience. The instructors were assisted by both occupational consultants and subject matter specialists.

The project resulted in producing one hundred two trained vocational instructors capable of conducting and assisting in a comprehensive analysis of various occupations. Occupational analysis data were generated for sixty-one occupations. The analysis included a statement of the various tasks performed in each occupation. For each task the following items were identified: tools and equipment; procedural knowledge; safety knowledge; concepts and skills of mathematics, science and communication needed for successful performance in the occupation. The analysis data provided a basis for generating instructional materials, course outlines, student performance objectives, criterion measures as well as identifying specific supporting skills and knowledge in the academic subject areas.

PREFACE

The partici[illegible]s approached this task from the position of the insurance salesperson's [illegible]ties. The analysis started with the assumption that the salesperson is [illegible]mpetent and has been licensed by the state in which he/she is selling. No [illegible]ecific duty was analyzed as to kind of insurance sold (life, health and accide[illegible] casualty or business insurance).* These are general duties and are performed b[illegible] any insurance salesperson regardless of the employment agency (some agents are debit agents, some are self-employed while others are brokers who represent several companies). No attempt was made to go into detail on the specific tasks of maintaining an adequate staff: purchasing, accounting and filing. These duties would vary depending on the agent's mode of employment and would be a duplication of other occupational analyses.

*Each of these categories require an unique approach to the prospect.

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JOB DESCRIPTION

A licensed insurance salesperson locates prospective clients; sells, writes and services policies, collects and accounts for premiums; investigates and adjusts claims; maintains good community relations; maintains an efficient office; reports periodically to supervisors and entertains prospective clients and prospective employees.

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Duty A Servicing Policies

1 Maintain current policies
2 Adjust claims
3 Give gifts
4 Review policy's coverage
5 Maintain a current file
6 Provide proof of insurance

(TASK STATEMENT) MAINTAIN CURRENT POLICIES

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TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
Present policyholder Present policy in force Applications and rate books Pen and scratch paper Proper forms	STEPS: Contact policyholder Question policyholder Give information Give advice Add or delete rider Write new policy Cancel existing policy Send premium due notice	

DECISIONS	CUES	ERRORS
Determine if new policy is needed Select proper rider or new policy	Clients' tone of voice Clients' making excuses or reasons Clients' changing the subject	No new policy or rider Cancellation of existing policy Loss of prestige Legal action taken against agent

(TASK STATEMENT) MAINTAIN CURRENT POLICIES

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill Being cautious of how to talk to client with facts known	Rational numbers Fundamental operations (calculation) Basic arithmetic skills and concepts: -finding a % of a number and what % one number is of another -changing fractions to decimals and decimals to fractions -rounding off decimals and whole numbers Use of computing devices and mechanical aids: -calculators (electric and mechanical)

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-speaking to policyholder	-clarity of expression, enunciation, persuasion and sales techniques and logic
Writing	-writing information for current policies	-classification, description and terminology
Listening	-listening to policyholder's changes	-discriminate facts from non-facts, concentration and note taking
Viewing	-viewing clients property	-visual analysis and detail inference
Reading	-reading present policy folder	-comprehension and informational reports

(TASK STATEMENT) ADJUST CLAIMS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Policy in force Policyholder Proof of legal loss Claim forms	Steps: Check if loss is covered by policy Determine dollar loss Compensate for loss	

DECISIONS	CUES	ERRORS
If loss is covered If loss is legal Amount of compensation	Official report of loss	Paying incorrect amount (loss to company) Lose clients other contracts

(TASK STATEMENT) ADJUST CLAIMS

SCIENCE	MATH – NUMBER SYSTEMS
Show empathy toward claimant Exercise qualities of: tact (especially during death settlement) accuracy honesty respect goodwill Just in claim settlement Understanding policyholder's need	Rational numbers Fundamental operations (calculation) Basic arithmetic skills and concepts: -changing % to fractions and fractions to % -finding a % of a number and what % one number is of another -changing fractions to decimals and decimals to fractions Property of the real number system: -commutative (order) -associative (grouping) -distributive (multiplication W.R.T. addition) Use of computing devices and mechanical aids: -calculators (electric and mechanical) Rounding off decimals and whole numbers

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COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-delivering oral reports and instructions	-enunciation, terminology, clarity of expression and usage
Reading	-official reports and statement from insured	-comprehension, informational reports and processing of reports
Writing	-settlement, proof of loss, loss report and bureau of motor vehicle report	-description and terminology
Listening	-claimant's version of claim	-discriminate facts, recognize opinions and note taking
Viewing	-policyholder and insured vehicle to determine extent	-detail and memory

(TASK STATEMENT) GIVE GIFTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
List of policyholders Appropriate gifts Standard office equipment	Steps: Determine occasions Determine gifts Deliver	

DECISIONS	CUES	ERRORS
Decide what occasions Decide what gifts Determine dollar value Determine how to deliver	Oral or written communications Dollar amount of policy Ideas of types (brands) of gifts	Loss of accounts

(TASK STATEMENT) GIVE GIFTS

SCIENCE	MATH – NUMBER SYSTEMS
Offensive to or inappropriate for policyholder (use strategy) Exercise qualities of: tact accuracy honesty respect goodwill Usefulness of gift so policyholder will remember where gift came from	Fundamental operations (calculation) Rational numbers Basic arithmetic skills and concepts: -finding a % of a number and what % one number is of another Property of comparison Use of computing devices and mechanical aids -calculators (electric and mechanical)

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Reading Writing Listening	-delivering gift -policy file -accompanying card -listening to policyholder for types (brands) of gifts he/she likes	-enunciation, clarity of expression and poise -comprehension -penmanship and form/content -concentration

(TASK STATEMENT) REVIEW POLICY'S COVERAGE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Existing policy Rate books New policy applications Policyholder	Steps: Scan coverage and check rates Contact policyholder Make changes if needed	
DECISIONS If change is to be made	**CUES** Checking files "Small talk" with policyholder	**ERRORS** Lose image Lose the contract Lose exposure that is not covered

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(TASK STATEMENT) REVIEW POLICY'S COVERAGE

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill CAUTION	Rational numbers Fundamental operations (calculation) Basic arithmetic skills and concepts: -changing % to fractions and fractions to % -finding a % of a number and what % one number is of another -changing fractions to decimals and decimals to fractions -rounding off decimals and whole numbers Properties of the real number system: -commutative (order) -associative (grouping) Use of computing devices and mechanical aids: -calculators (electric, mechanical) Basic algebra skills and concepts: -solve problems involving numerical algebraic expressions

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-to policyholder	-appropriate diction, clarity of expression and poise
Reading	-present policy	-comprehension, recommendation reports and detail/inference
Writing	-new policy or riders	-terminology and description
Listening	-to policyholder	-concentration and discriminate facts from non-facts
Viewing	-policy and insured property	-visual analysis, memory and detail/ inference

(TASK STATEMENT) MAINTAIN A CURRENT FILE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Enter information Add to or delete from	

DECISIONS	CUES	ERRORS
Do promptly	The sale Changes made	Lose policy due to lapsed coverage

(TASK STATEMENT) MAINTAIN A CURRENT FILE

SCIENCE	MATH – NUMBER SYSTEMS
Noting previous interactions with policyholders	Whole numbers Uses of numbers: (without calculation) -indexing

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Writing	-entering information into files	-classification, memo format, description, logic and clarity of expression
Reading	-writing, transcribing (copying) information	-accuracy

(TASK STATEMENT) PROVIDE PROOF OF INSURANCE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Proper forms Standard office equipment	Steps: Secure necessary information Prepare forms Deliver	

DECISIONS	CUES	ERRORS
Do promptly	Received request	Lose referrals from mortgage comapnies and from friends

(TASK STATEMENT) PROVIDE PROOF OF INSURANCE

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy (special emphasis) honesty respect goodwill Promptness to maintain image	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading Writing Listening	-requests received -report of amount of insurance covered -to verbal requests	-comprehension -description -understand what is requested, note taking, clarification and terminology

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Duty B Prospecting

1 Obtain engagement, marriage, birth, death announcements and other official reports
2 Obtain lists of graduating students
3 Obtain lists of property transfers, building permits and car sales
4 Distribute flyers to apartment complexes
5 Obtain lists of promotions
6 Cold canvass
7 Obtain referrals from policyholders, friends, other agents, centers of influence and paid solicitors

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(TASK STATEMENT) OBTAIN ENGAGEMENT, MARRIAGE, BIRTH, DEATH ANNOUNCEMENTS AND OTHER OFFICIAL REPORTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Newspaper Prospect file Clerk of courts: courthouse, official files	Steps: Read notices Call prospect	

DECISIONS	CUES	ERRORS
Appropriate time to call Methods of approach	Notice in paper Social status	Loss of sale

(TASK STATEMENT) OBTAIN ENGAGEMENT, MARRIAGE, BIRTH, DEATH ANNOUNCEMENTS AND OTHER OFFICIAL REPORTS

SCIENCE	MATH – NUMBER SYSTEMS

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	-official reports at courthouse or in newspaper	-comprehension and detail
Writing	-copying information and description	-clarification

(TASK STATEMENT) OBTAIN LISTS OF GRADUATING STUDENTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Newspapers Lists from colleges, technical schools and high schools	Steps: Obtain newspapers Contact registrar Contact teachers Qualify names	

DECISIONS	CUES	ERRORS
Decide: From whom to obtain Method of approach When to get	Time of the year	Loss of sales

(TASK STATEMENT) OBTAIN LISTS OF GRADUATING STUDENTS

SCIENCE	MATH – NUMBER SYSTEMS
Students should be aware of dangers of using lists supplied by third party Embarassment Revealing confidential information	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-to school registrars, secretaries and administrators	-clarity of expression, persuasion and sales techniques, logic, appropriate diction and poise
Reading	-newspaper	-comprehension and informational reports

(TASK STATEMENT) OBTAIN LISTS OF PROPERTY TRANSFERS, BUILDING PERMITS AND CAR SALES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Newspapers Courthouse-Clerk of courts Real estate agents New and used car dealers Building contractors Bankers Mortgage broker	Steps: Contact appropriate resource Obtain appropriate lists	

DECISIONS	CUES	ERRORS
How to approach When to approach	Information-dates on report	Loss of sale

(TASK STATEMENT) OBTAIN LISTS OF PROPERTY TRANSFERS, BUILDING PERMITS AND CAR SALES

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-to brokers, agents and bankers	-clarity of expression, persuasion and sales techniques, logic, poise and appropriate diction
Reading	-reports and newspapers	-comprehension and detail
Listening (alert)	-to "centers of influence" for prospects	-discriminate facts from non-facts, recognize opinions and note taking

(TASK STATEMENT) DISTRIBUTE FLYERS TO APARTMENT COMPLEXES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Flyer with appropriate information	Steps: Deliver flyers to apartments	

DECISIONS	CUES	ERRORS
Decide to do on a regular basis Determine information of flyer Determine when to distribute	Empty apartments Moving vans Newly opened complexes	Loss of sales

(TASK STATEMENT) DISTRIBUTE FLYERS TO APARTMENT COMPLEXES

SCIENCE	MATH – NUMBER SYSTEMS

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Viewing Writing	-empty apartments -information particular to area	-memory and visual analysis -classification and persuasion and sales techniques

(TASK STATEMENT) OBTAIN LISTS OF PROMOTIONS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Newspapers House organs Center of influence Friends Civic organization contracts	Steps: Obtain newspaper and house organs Contact resources List appropriate information	

DECISIONS	CUES	ERRORS
Do on regular basis	Read, listen (alert)	Loss of potential sales

(TASK STATEMENT) OBTAIN LISTS OF PROMOTIONS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking and listening	-to friends and centers of influence	-clarity of expression, perusassion and sales technique, poise, concentration and note taking
Reading	-publications	-detail, proposals and terminology

(TASK STATEMENT) COLD CANVASS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Flyers Business cards Rate books	Steps: Determine geographic area Develop suitable presentation and goals	

DECISIONS	CUES	ERRORS
Where to canvass What presentation to make Which materials to take	Economic area	Loss of sale

(TASK STATEMENT) COLD CANVASS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	Counting numbers

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-to prospect door-to-door	-terminology, enunciation, clarity of expression and poise
Writing	-notes for future reference	-memo format and clarity of expression
Listening	-to prospects	-recognize opinions and discriminate facts from non-facts
Viewing	-property to be insured	-visual analysis, detail and memory

(TASK STATEMENT) GET REFFERALS FROM PRESENT POLICYHOLDERS, FRIENDS, CENTERS OF INFLUENCE, OTHER AGENTS AND SOLICITORS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Present policyholder Friends Other agents Solicitors Centers of influence	Steps: Contact present policyholder (informally) During initial contact or during sales of policy	

DECISIONS	CUES	ERRORS
Determine names of prospective policyholders	"Small talk" with policyholers Policyholders' referrals	Lose sales

(TASK STATEMENT) GET REFERRALS FROM PRESENT POLICYHOLDERS, FRIENDS, CENTERS OF INFLUENCE, OTHER AGENTS AND SOLICITORS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-to policyholders, friends, etc.	-implying, poise and clarity of expression
Reading	-memos from other agents	-comprehension, detail/inference and terminology
Writing	-the referral on a prospect card	-clarity of expression
Listening	-to people	-recognize opinions, concentration and note taking

Duty C Selling Policies

1 Make an appointment
2 Break the ice
3 Question prospect in a controlled situation to determine his/her needs
4 Explain an appropriate solution and how it fits his/her needs
5 Answer prospect's questions
6 Explain premium and mode of payment
7 Reassure applicant

(TASK STATEMENT) MAKE AN APPOINTMENT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Prospect list Standard office equipment (especially telephone)	Steps: Call prospect Introduce self Explain reason for calling Ask questions Ask for appointment Determine best time/place	

DECISIONS	CUES	ERRORS
Determine where to call (home/ business) Determine when to call Determine how to approach Determine where/when appointment	Tone of voice Reactions to questions	Offend prospect Lose sales opportunity

(TASK STATEMENT) MAKE AN APPOINTMENT

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact (special emphasis) accuracy honesty respect goodwill	Counting numbers Use of numbers (without calculation) -coordinate system Basic measurement skills and concepts -measurement: non-geometric (time)

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	-information from prospect file	-comprehension and detail
Speaking	-to prospect	-enunciation, clarity of expression and persuasion and sales technique
Listening	-to prospect's answers	-discriminate facts from non-facts, recognize opinions and note taking
Writing	-letter for appointment	-business letters (content), clarity of expression, persuasion and sales technique and logic

(TASK STATEMENT) BREAK THE ICE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Prospect Appropriate topic of information	Steps: Observe surroundings for appropriate topic(s) Initiate (small talk) conversation Observe when prospect is relaxed	

DECISIONS	CUES	ERRORS
Decide on object of conversation Determine when prospect is relaxed	Tone of voice Mannerisms Changing of topic by prospect	Lose of prospective sale Lose of prestige

(TASK STATEMENT) BREAK THE ICE

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill Be sure to include all present Avoid controversial subject Listen more than talk Avoid dominance (conversation) Do not try to "outdo" prospect	

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COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-to prospect and family	-poise, enunciation, denotative/ connotative words and gestures
Listening	-to prospect	-recognize opinions and concentration
Viewing	-object to be discussed and prospect to see when he/she is ready to "talk" insurance	-visual analysis and memory

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(TASK STATEMENT) QUESTION PROSPECT IN A CONTROLLED SITUATION TO DETERMINE NEEDS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Prospect Sales Kit	Steps: Eliminate distractions Question prospect Calculate prospect income Determine dollar amount he/she can spend for insurance Determine cost of desired insurance	

DECISIONS	CUES	ERRORS
How to approach prospect (questioning) How personal of question to ask	Answers to questions Facial expressions Tone of voice	Loss of potential sale

(TASK STATEMENT) QUESTION PROSPECT IN A CONTROLLED SITUATION TO DETERMINE NEEDS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact (special emphasis) accuracy honesty respect goodwill	Rational numbers Fundamental operations (calculation) Use of computing devices and mechanical aids: -calculators (electric and mechanical) Basic measurement skills and concepts: -reading and interpreting tables, charts and graphs: (number line/coordinate graph [2-dimensional and 3-dimensional])

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COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Listening Viewing	-to prospect and family -to prospect -prospect for cues	-poise and enunciation -concentration -visual analysis

(TASK STATEMENT) EXPLAIN AN APPROPRIATE SOLUTION (POLICY) AND HOW IT FITS NEEDS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Prospect Sales kit	Steps: Review prospect's need (mentally) Determine policy(s) that will fit his/her needs Explain advantages of policy(s) a. cost b. savings, if applicable Review prospect's need and how specific policy fills that need	

DECISIONS	CUES	ERRORS
Dollar amount of insurance to show prospect Which policy to show prospect	Tone of voice Facial expression Excuses from prospect Prospect's answers to questions	Loss of prospect

(TASK STATEMENT) EXPLAIN AN APPROPRIATE SOLUTION (POLICY) AND HOW IT FITS NEEDS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill (Special emphasis on tact and empathy)	Rational numbers Fundamental operations (calculation) Basic arithmetic skills and concepts Basic measurement skills and concepts: -reading and interpreting tables, charts and graphs (numberline/coordinate graph[2-dimensional and 3-dimensional]) Basic algebra skills and concepts: -solve problems involving numerical algebraic expressions

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-questioning prospect	-terminology, clarity of expression, poise, dress, facial and body features, and persuasion and sales technique
Reading	-policy and rate books	-comprehension and terminology
Writing	-note taking and calculation rates	-clarity of expression
Listening	-to prospect	-discriminate facts from non-facts, recognize opinions and note taking

(TASK STATEMENT) ANSWER PROSPECT'S QUESTIONS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Prospect Sales kit	Steps: Listen carefully to prospect's questions Reaffirm question Determine what prospect is asking Determine best method to answer question Answer question if it requires an answer	

DECISIONS	CUES	ERRORS
Whether to answer question or avoid question How to answer question How to avoid question	Tone of voice Facial expression	Loss of sale Loss of prestige

(TASK STATEMENT) ANSWER PROSPECT'S QUESTIONS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill Avoid abasement Flatter prospect on asking question	Rational numbers Fundamental operations (calculation) Basic arithmetic skills and concepts: -reduction of fractions -changing mixed numbers to improper fractions -changing % to fractions and fractions to % -finding a % of a number and what % one number is of another -changing fractions to decimals and decimals to fractions -ratio and proportion

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-to prospect	-clarity of expression, persuasion and sales technique, logic and gestures
Listening	-to questions	-discriminate facts from non-facts, recognize opinions and logic
Writing	-comparing policies	-clarity of expression, description and logic

(TASK STATEMENT) EXPLAIN PREMIUM AND MODE OF PAYMENT

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TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Prospect Policy application Rate book	Steps: Inform prospect of dollar cost Show different methods of payment Ask prospect which method he/she prefers	

DECISIONS	CUES	ERRORS
How to approach prospect with premium payment	Facial expressions Questions from prospect	Loss of sale

(TASK STATEMENT) EXPLAIN PREMIUM AND MODE OF PAYMENT

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	Rational numbers Fundamental operations (calculations) Basic arithmetic skills and concepts: -changing % to fractions and fractions to % -finding a % of a number and what % one number is of another -changing fractions to decimals and decimals to fractions

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Listening	-explaining premium and payment to prospect -to questions	-terminology, clarity of expression, logic and poise -discriminate facts from non-facts and concentration

(TASK STATEMENT) REASSURE APPLICANT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Prospect Brochure	Steps: Review coverages Review how needs are covered Convince applicant of his/her wise decision	

DECISIONS	CUES	ERRORS
What to say How to say it	Facial expression	Loss of sale

(TASK STATEMENT) REASSURE APPLICANT

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill Use sound reasoning	

COMMUNICATIONS		
PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-compliment applicant	-terminology, clarity of expression and poise

Duty D Writing The Policy

1 Complete the application
2 Complete inspection forms

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(TASK STATEMENT) COMPLETE THE APPLICATION

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Prospect Sales kit	Steps: Complete personal information section Complete medical section Recompute rate, if necessary Have applicant sign Collect first premium Give (conditional) receipt	

DECISIONS	CUES	ERRORS
	Facial expression Tone of voice	Inaccurate rate quotation Cause embarassment Agent lose money

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(TASK STATEMENT) COMPLETE THE APPLICATION

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy (special emphasis) honesty respect goodwill	Rational numbers Fundamental operations (calculation) Basic arithmetic skills and concepts: -changing % to fractions and fractions to % -finding a % of a number and what % one number is of another -changing fractions to decimals and decimals to fractions

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-prospect	-enunciation
Reading	-application	-comprehension and terminology
Writing	-application	-penmanship, spelling and description
Listening	-to applicant	-discriminate facts from non-facts
Viewing	-applicant	-visual analysis

(TASK STATEMENT) COMPLETE INSPECTION FORMS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Proper forms Camera Standard office equipment	Steps: Secure proper form or equipment Complete form (instructions indicated) Transmit through proper channel	
DECISIONS	**CUES**	**ERRORS**
How much detail to use Promptness	When required	Inappropriate coverage

(TASK STATEMENT) COMPLETE INSPECTION FORMS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy (special emphasis) honesty respect goodwill	Counting numbers Use of numbers (without calculation) -counting

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Writing	-proper form	-description, terminology, clarity and classification
Viewing	-prospect	-describing, and recognition of symbols and codes

Duty E Delivering The Policy

1 Make an appointment
2 Explain policy to policyholder and answer questions
3 Correct errors
4 Collect premium
5 Obtain referral

(TASK STATEMENT) MAKE AN APPOINTMENT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Telephone applicant Set appointment Record appointment-time & place Above steps are sometimes done by mail or in person	

DECISIONS	CUES	ERRORS
Time to call or see	When policy is deliverable	Embarassment Unacceptability of policy

(TASK STATEMENT) MAKE AN APPOINTMENT

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-client	-persuasion and sales technique and logic
Writing	-letter	-business letters
Listening	-prospect	-note taking and concentration

(TASK STATEMENT) EXPLAIN POLICY TO POLICYHOLDER AND ANSWER ANY QUESTIONS

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TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Policy Applicant	Steps: Go over main points of policy Answer policyholder's questions	
DECISIONS What parts of policy to illustrate How much detail	**CUES** Questions Facial expressions	**ERRORS** Misrepresentation of policy

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(TASK STATEMENT) EXPLAIN POLICY TO POLICYHOLDER AND ANSWER ANY QUESTIONS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	Rational numbers

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-explanation of policy, contract	-enunciation and clarity of expression
Reading Listening	-policy -policyholder's questions	-detail/inference and terminology -concentration and note taking

(TASK STATEMENT) CORRECT ERRORS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Policy Error Proper forms Policyholder	Steps: Locate error Reassure client of coverage Complete change form Forward change form Deliver corrected policy to insured	

DECISICNS	CUES	ERRORS
Determine error (if any)	Observation: agent and policyholder	Loss of image and prestige Irate policyholder

(TASK STATEMENT) CORRECT ERRORS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact (special emphasis) accuracy honesty respect goodwill	Rational numbers Fundamental operations (calculation) Basic arithmetic skills and concepts: -changing fractions to decimals and decimals to fractions Use of computing devices and mechanical aids: -calculators (electric and mechanical)

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	-policyholder	-persuasion and sales technique and poise
Reading	-policy	-comprehension
Writing	-change forms	-memo format, clarity of expression
Listening	-policyholder	-note taking

(TASK STATEMENT) COLLECT PREMIUM

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Policy Cash for change Receipt	Steps: Notify client premium is payable Receive premium Make change, if necessary Credit account Issue receipt	

DECISIONS	CUES	ERRORS
	If policy is accepted	Loss of time, money

(TASK STATEMENT) COLLECT PREMIUM

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact (special emphasis) accuracy honesty respect goodwill	Use of numbers (without calculation): -counting

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Writing Listening	policyholder receipt policyholder	clarity of expression penmanship and spelling concentration

(TASK STATEMENT) OBTAIN REFERRAL

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Policyholder Referral sheet	Steps: Ask policyholder about neighbors, friends, etc, who may be uninsured or under insured Obtain permission to use his/her name as reference	

DECISIONS	CUES	ERRORS
To ask for referrals	Small talk references	Lose of prestige Losing prospects

(TASK STATEMENT) OBTAIN REFERRAL

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact (special emphasis) accuracy (special emphasis) honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	policyholder	comprehension
Writing	referrals	spelling, memo format
Listening	policyholder	accuracy, note taking

Duty F Collecting The Premium

1 Prepare collection lists
2 Contact policyholder
3 Receive money
4 Credit policyholder's account and issue receipt

(TASK STATEMENT) PREPARE COLLECTION LISTS

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TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Review accounts receivable Pull delinquent accounts Prepare list of deliquent accounts	

DECISIONS	CUES	ERRORS
Determine if the account is overdue	When policyholder's name appears on tickler file	Lapse of coverage Loss of money to agent

(TASK STATEMENT) PREPARE COLLECTION LISTS

SCIENCE	MATH – NUMBER SYSTEMS
	Rational numbers Fundamental operations (calculation) Addition Substraction Multiplication Division

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	file	comprehension and detail inference
Writing	the collection list	memo format, description

(TASK STATEMENT) CONTACT POLICYHOLDER

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: notify policyholder (mail invoice, contact policyholder)	

DECISIONS	CUES	ERRORS
Whether in person or by mail	Pre-set date to notify	Loss of collection Lapsed insurance

(TASK STATEMENT) CONTACT POLICYHOLDER

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Writing Listening	policyholder invoice policyholder	clarity of expression memo format and business letter logic

(TASK STATEMENT) RECEIVE MONEY

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Receive premium Make change if applicable Give receipt if applicable Record payment	
DECISIONS	**CUES**	**ERRORS**
		Give wrong change

(TASK STATEMENT) RECEIVE MONEY

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	Rational numbers Fundamental operations (calculation) Addition Substraction Multiplication Division

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Writing	policyholder receipt	clarity of expression penmanship

(TASK STATEMENT) CREDIT POLICYHOLDER'S ACCOUNT AND ISSUE RECEIPT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Receipt account Prepare and issue receipt	
DECISIONS	**CUES**	**ERRORS**
		Insurance could lapse Lose prestige

(TASK STATEMENT) CREDIT POLICYHOLDER'S ACCOUNT AND ISSUE RECEIPT

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	Rational numbers Fundamental operations (calculation) Addition Substraction Multiplication Division

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Writing	receipt	penmanship

Duty G Accounting For Premiums Collected

1 Balance collection with receipts
2 Deposit collection

(TASK STATEMENT) BALANCE COLLECTION WITH RECEIPTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Total collection Total receipts Compare	
DECISIONS	**CUES**	**ERRORS**
		Overage or shortage

(TASK STATEMENT) BALANCE COLLECTION WITH RECEIPTS

SCIENCE	MATH – NUMBER SYSTEMS
	Rational numbers Fundamental operations (calculation) Use of computing devices and mechanical aids: -calculators (electric, mechanical)

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	calculator tape	detail/inference
Viewing	calculator tape	detail/inference

(TASK STATEMENT) DEPOSIT COLLECTION

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Prepare deposit list Record in account Deposit with proper institution	

DECISIONS	CUES	ERRORS
Timing of deposit	When funds warrant	Posting account

(TASK STATEMENT) DEPOSIT COLLECTION

SCIENCE	MATH – NUMBER SYSTEMS
	Rational numbers Fundamental operations (calculation) Addition Substraction Multiplication Division

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Writing	deposit ticket	penmanship

Duty H Preparing Reports

1 Assemble necessary data
2 Put data into report form
3 Transmit report to company

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(TASK STATEMENT) ASSEMBLE NECESSARY DATA

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: What report is needed Assemble necessary data	

DECISIONS	CUES	ERRORS
	Periodically or when requested	Loss of jobs Sending incorrect information

(TASK STATEMENT) ASSEMBLE NECESSARY DATA

SCIENCE	MATH – NUMBER SYSTEMS
Exercise quality of: accuracy	Rational numbers Use of numbers (without calculation) -coordinate system Fundamental operations (calculation) Use of computing devices and mechanical aids -calculators (electric, mechanical)

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	available data	comprehension, detail/inference and informational reports

(TASK STATEMENT) PUT DATA INTO REPORT FORM

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment Assembled data	Steps: Determine desired format Transfer data to report form	

DECISIONS	CUES	ERRORS
Which format to use How much data to include	Requests	Incomplete informational reports

(TASK STATEMENT) PUT DATA INTO REPORT FORM

SCIENCE	MATH – NUMBER SYSTEMS
Exercise quality of: accuracy	Rational numbers Graphing

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading Writing	Information Report	comprehension business letter, reports (progress and informational) and clarity of expression

(TASK STATEMENT) TRANSMIT REPORT TO COMPANY

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment Report to be transmitted	Steps: Determine proper mode of transmitting report Transmit report	

DECISIONS	CUES	ERRORS
How to transmit report	Request or policy of company	Incomplete or not understanding form

(TASK STATEMENT) TRANSMIT REPORT TO COMPANY

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	Oral report	Terminology, enunciation, clarity of expression and poise
Writing	Written report	Spelling, description, clarity of expression, logic and usage

Duty I **Maintaining Good Public Relations**

1 Speak to local community organizations and schools
2 Join community organizations
3 Sponsor civic activities
4 Be a good neighbor
5 Be publicly non-partisan

(TASK STATEMENT) SPEAK TO LOCAL COMMUNITY ORGANIZATION AND SCHOOLS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Sales kit	Steps: Receive invitation Accept invitation Arrive promptly Prepare talk Deliver talk	

DECISIONS	CUES	ERRORS
Content of talk How to approach audience		Loss of prospects Loss of image

(TASK STATEMENT) SPEAK TO LOCAL COMMUNITY ORGANIZATION AND SCHOOLS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill Credibility First impression	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	give talk	terminogloy/general vocabulary, appropriate diction, implying, enunciation, clarity of expression, denotative and connotative words, logic, gestures, dress, poise and usage
Writing	illustrate talk	penmanship and clarity of expression

JOIN COMMUNITY ORGANIZATIONS

(TASK STATEMENT)

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Organization	Steps: Gather information about organization Apply through proper channels	

DECISIONS	CUES	ERRORS
Which one(s) to join		Lose prestige

(TASK STATEMENT) JOIN COMMUNITY ORGANIZATIONS

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	to members and non-members	clarity of expression
Listening	to members and non-members	discriminate facts from non-fact and recognize facts

(TASK STATEMENT) SPONSOR CIVIC ACTIVITIES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Whatever is sponsored	Steps: Organize event to be sponsored Provide necessary equipment or supplies Supervise event	
DECISIONS	**CUES**	**ERRORS**
What to sponsor How much to spend		Spend too much money and time

(TASK STATEMENT) SPONSOR CIVIC ACTIVITIES

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	Members of organization	Persuasion

(TASK STATEMENT) BE A GOOD NEIGHBOR

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
People	Steps: Be helpful Be considerate	

DECISIONS	CUES	ERRORS
How helpful to be	Someone in need	Loss of image

(TASK STATEMENT) BE A GOOD NEIGHBOR

SCIENCE	MATH - NUMBER SYSTEMS
Exercise qualities of: tact (special emphasis) accuracy honesty respect goodwill Emphasize empathy	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Listening Viewing	neighbor neighbor problems	denotative, poise concentration visual analysis, logic

(TASK STATEMENT) BE PUBLICLY NON-PARTISAN

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD

DECISIONS	CUES	ERRORS
		Lose image Lose clients

(TASK STATEMENT) BE PUBLICLY NON-PARTISAN

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact (special emphasis) accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking Listening	anybody anyone	poise and logic detection of propaganda devices, discriminate facts from non-facts and recognize opinions

Duty J Rating

1 Quote rate
2 Follow-up on quote
3 File information for later reference

(TASK STATEMENT) QUOTE RATES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Determine classification of risk Determine appropriate policy Calculate rate Quote rate to prospect	

DECISIONS	CUES	ERRORS
Which policy to quote rate for Manner in which to quote rate		Loss of sale

(TASK STATEMENT) QUOTE RATES

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy (special emphasis) honesty respect goodwill	Rational numbers Fundamental operations (calculation) Use of computing devices and mechanical aids: -calculators (electric-mechanical)

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	answering questions or quoting rate	-terminology, clarity of expression, enunciation and persuasion and sales technique
Reading Listening	from rate book to questions	-comprehension and detail -discriminate facts from non-facts, concentration and logic

FOLLOW-UP ON QUOTE

(TASK STATEMENT)

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Contact person (prospect) Ask if he/she has obtained insurance or insurable property Review rate quote and coverage	

DECISIONS	CUES	ERRORS
When to contact How to approach	Tone of voice Facial expression	Loss of sale

(TASK STATEMENT) FOLLOW-UP ON QUOTE

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact (special emphasis) accuracy honesty respect goodwill	

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Reading	information from memo file	comprehension and information reports
Speaking	to prospect	persuasion and sales technique, clarity of expression and logic
Listening	to prospect	discriminate facts from non facts

(TASK STATEMENT) FILE INFORMATION FOR LATER REFERENCE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Transfer information from memory, or scratch paper onto file form Put form in proper file	

DECISIONS	CUES	ERRORS
Which file to use How much information to record	Information received	Loss of information Loss of prospect and possible sale

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(TASK STATEMENT) FILE INFORMATION FOR LATER REFERENCE

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy (special emphasis) honesty respect goodwill	Whole numbers Use of numbers (without calculation) -counting, coordinate system and indexing

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Writing	information into filing system	classification, memo format, description and logic

Duty K Maintaining An Office

1 Recruit, train, evaluate and terminate office staff
2 Purchase supplies and equipment
3 Maintain adequate records
4 Oversee housekeeping duties
5 Oversee maintenance of equipment

(TASK STATEMENT) RECRUIT, TRAIN, EVALUATE AND TERMINATE STAFF

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment Staff	Steps: Advertise for employees Interview applicants Select applicant Train Evaluate Promote Terminate	
DECISIONS	**CUES**	**ERRORS**
How to advertise How to select How to train Method of evaluation When to promote Method to terminate		Employ inadequate staff

(TASK STATEMENT) RECRUIT, TRAIN, EVALUATE AND TERMINATE STAFF

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy honesty respect goodwill	Rational numbers in testing and in evaluating

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Speaking	to staff personnel	-implying, clarity of expression, enunciation and poise
Reading	evaluations, tests and applications	-detail/inference and progress reports
Writing	evaluations	-clarity of expression, denotative/ connotative words and memo format
Listening	to staff	-discriminate facts from non-facts and recognize opinions
Viewing	staff	-visual analysis, memory and detail/ inference

(TASK STATEMENT) PURCHASE SUPPLIES AND EQUIPMENT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment	Steps: Determine supplies and equipment needed Determine amount to order Determine supplier Place order (write, phone)	

DECISIONS	CUES	ERRORS
What supplies are needed Amount to order Which supplier How to order	When low on supplies When equipment is needed	Lost sales due to no supplies Loss of image

(TASK STATEMENT) PURCHASE SUPPLIES AND DQUIPMENT

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy (special emphasis) honesty respect goodwill	Rational numbers Fundamental operations (calculation) Addition Substraction Multiplication Division

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Viewing Reading Writing	supplies catalogs orders	visual analysis inference and description of mechanism business letters and clarity of expression

(TASK STATEMENT) MAINTAIN ADEQUATE RECORDS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Standard office equipment		
DECISIONS	**CUES**	**ERRORS**

SCIENCE	MATH – NUMBER SYSTEMS
Exercise qualities of: tact accuracy (special emphasis) honesty respect goodwill	Rational numbers Fundamental operations Use of computing devices and mechanical aids: -calculators (electric, mechanical)

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Writing	records	classification, clarity of expression and accuracy

(TASK STATEMENT) OVERSEE HOUSEKEEPING DUTIES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
General cleaning tools	Steps: See that cleaning is done	
DECISIONS Who shall clean How often	**CUES**	**ERRORS** Loss of image Fire hazard

(TASK STATEMENT) OVERSEE HOUSEKEEPING DUTIES

SCIENCE	MATH – NUMBER SYSTEMS

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Viewing	what needs to be done/how it was done	visual analysis and detail/inference

(TASK STATEMENT) OVERSEE MAINTENANCE OF EQUIPMENT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
Office equipment	Steps: Call repair company Do own preventative maintenance	

DECISIONS	CUES	ERRORS
Which company to call Do it one's self or call repair company	If equipment malfunctions	Loss of time due to breakdown of equipment Have to purchase replacement equipment

(TASK STATEMENT) OVERSEE MAINTENANCE OF EQUIPMENT

SCIENCE	MATH – NUMBER SYSTEMS

COMMUNICATIONS

PERFORMANCE MODES	EXAMPLES	SKILLS/CONCEPTS
Viewing	equipment operation	visual analysis

GLOSSARY

Standard sales kit

1. rate books
2. applications
3. change applications
4. inspection forms
5. medical examiners list
6. conversion forms
7. sample policies
8. receipts and bank notes
9. business cards and license
10. brochures
11. give aways (gifts)

Standard office equipment

1. desk, chairs
2. typewriter
3. receipt book
4. proper forms-endorsements/policy forms/memos
5. filing system-files/forms
6. calculator/adding machine
7. telephone
8. copier
9. reference books
10. miscellaneous supplies-paper, pencils, pens, folders, policy jackets
11. ledgers-checks, company accounts, deposits

TERM:

center of influence: influential person in the community whose name is recognized; used in insurance sales to get prospects and to "open doors"